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Netherlands

Exporter Guide

Annual for the Benelux

2005

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Report Highlights:
This report provides an overview for U.S. companies interested in exporting to the Benelux (Belgium, Luxembourg & Netherlands), focusing on exports of consumer-oriented food, beverages and edible fishery products.

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SECTION I. Market Overview

Economic Situation

The Netherlands

Economic growth in 2005 is expected to remain weak at an estimated 0.5 %, down from 1.7 % in 2004. This number hides a hopeful reversal, as a negative growth of -0.5 % in the first quarter turned into a positive 1.3 % growth in the second quarter. This positive trend is expected to pick up again in 2006. Based on current budget proposals, the Netherlands Bureau for Economic Policy Analysis (CPB) has provided an official estimate for 2006 economic growth of 2.5 %.

Overall growth is driven by exports, which was up 4.9 % compared to the first two quarters of 2004, while the 2005 pickup was mostly fueled by investment in office space and housing, up by 2.3 %. Consumer spending remains slow and is estimated to decrease by an estimated -0.75 % in 2005. The decrease in consumer spending is mostly due to a general decrease in people's net income and is accompanied by negative private saving, indicating that people are eating into their savings to finance consumption. For 2006, the cabinet has proposed measures to increase overall purchasing power by 2.5 billion euros, which it believes should boost private spending.

Inflation remains below the euro area average at an estimated 1.5 % in 2005. The impact of food prices on the overall price level is limited. A price war between the major super market franchises has decreased the prices of top-level brands, meat, dairy products, potatoes, vegetables and fruits (resulting in an annual growth of super market turnover of only 0.1 % in 2004), but it has left prices of other products unaffected. In addition, market conditions continue to affect the prices of these goods, driving them up in recent months.

Figure 1: Key Data Dutch Economy

	2004	2005*	2006*
Economic Growth	1.7	0.5	2.5
Inflation (CPI)	1.2	1.5	1.0
Unemployment	6.2	6.75	6.25
Consumer Spending	0.0	-0.75	1.0
On Food, Beverages and Tobacco	0.6	-1.0	0.5
On food	2.5		
On Beverages and Tobacco	-1.7		
Total Consumer Spending	222.7 billion	Euro	
Total Food Spending	19.9 billion	Euro	
Total Beverages and Tobacco Spending	12.2 billion	Euro	
Agricultural Trade			
Export	50.5 billion	Euro	
Import	28.9 billion	Euro	

Source: CBS * Estimate

Belgium
Economic growth in 2005 is expected to increase by 1.4% down from 2.7% in 2004. Compared to the Netherlands, Belgium's economy is less dependent on international trade. Inflation is expected to be 2.1% this year, similar to last year's percentage. Unemployment remains a problem in Belgium there are no signs for recovery. Just like the Dutch, the Belgians spend 15% of their total spending on food.

Figure 2: Key Data Belgian Economy

		2004	2005*	2006*
Economic Growth [1/]		2.7	1.4	2.4
Inflation (CPI) [1/]		1.9	2.1	1.8
Unemployment [1/]		7.8	7.9	8.0
Consumer Spending *		0.5	n.a.	n.a.
Total Consumer Spending [1/]		153.1 billion	Euro	
Total Food Spending (incl. Beverages & tobacco) [1/]		23.0 billion	Euro	
Agricultural Trade [2/]				
	Export	22.0 billion	Euro	
	Import	19.8 billion	Euro	

Source: 1=NBB, 2=wta, *= estimates

The Size And Growth Rate For The Consumer Foods And Edible Fishery Product Markets

Figure 3: US Exports Of Consumer-Oriented Agricultural And Fish & Seafood Products x US$ 1,000

US exports to Belgium/Netherlands/Luxembourg	CY 2002	CY 2003	CY 2004	Jan-June 2004	Jan-June 2005
Consumer-Oriented Agricultural Total	654,374	708,336	755,629	360,468	381,734
Snack Foods (Excl Nuts)	10,630	10,967	10,816	4,745	6,374
Breakfast Cereals & Pancake Mix	507	481	3,870	1,025	755
Red Meats, Fresh/Chilled/Frozen	14,495	13,128	18,933	7,745	15,088
Red Meats, Prepared/Preserved	461	1,052	1,510	347	628
Poultry Meat	1,028	10,568	1,070	367	426
Dairy Products	12,581	16,747	23,446	12,343	5,309
Eggs & Products	7,184	5,616	2,722	1,561	1,562
Fresh Fruit	25,594	30,839	37,108	18,734	23,832
Fresh Vegetables	11,083	13,330	11,229	6,286	5,696
Processed Fruit & Vegetables	64,809	63,468	54,265	27,864	29,964
Fruit & Vegetable Juices	133,214	115,478	103,226	57,002	40,303
Tree Nuts	153,022	176,053	208,903	88,094	127,855
Wine & Beer	72,423	88,931	99,622	37,259	26,104
Nursery Products & Cut Flowers	49,678	54,989	64,649	32,919	32,871
Pet Foods (Dog & Cat Food)	27,755	31,837	18,553	8,226	11,884
Other Consumer-Oriented Products	69,913	74,850	95,707	55,949	53,080
Fish & Seafood Products, Edible	90,252	112,117	138,183	31,137	59,157
Salmon, Whole Or Eviscerated	8,411	4,297	6,290	319	490
Salmon, Canned	9,320	8,495	7,225	3,156	4,001
Crab & Crabmeat	253	119	125	30	191
Surimi (Fish Paste)	1,789	5,115	3,842	71	6,447
Roe & Urchin (Fish Eggs)	1,274	1,071	5,673	1,363	845
Other Edible Fish & Seafood	69,205	93,022	115,028	26,199	47,183

Source: BICO

Key Demographic developments and the Impact on Consumer Buying Habits

The Benelux has over 26.7 million inhabitants and is the most densely populated region in the EU, with 412 people per square kilometer. More than two-thirds of its slowly growing population lives in a 100 mile corridor stretching from Amsterdam to Brussels. There are some 11.4 million households with an average size of 2.3 people.

Figure 4: Key Figures

	2004
Population	26.6 million
Number of Households	11.4 million
Household Size	2.3

Source: CBS, CIA

The trend toward smaller household size will continue and the population is aging (almost 15 percent of the population is 65 years or older).

Figure 5: Dutch Population by Age Group

Year	0 - 19	20 – 39	40 - 64	65 – 79	80+	Total Population
1963	38.1	26.4	26.1	7.9	1.5	11,889,962
1973	35.0	29.0	25.6	8.6	1.8	13,387,623
1983	29.7	32.6	26.0	9.4	2.4	14,339,551
1993	24.6	32.9	29.5	10.0	3.0	15,239,182
2003	24.5	28.6	33.2	10.4	3.4	16,192,572

Source: CBS

The non-Dutch population in the Netherlands (20%) has grown by 5 percent during the past 2 years whereas the population with Dutch ethnicity grew during the same period by only 1.1 percent. As a result there has been strong growth in the number of stores serving ethnic niche markets and demand for non-traditional Dutch food. The non-Belgian population in Belgium is much smaller and accounts for only 7%.

Figure 6: Main Non-Dutch Population by Ethnicity

	2003	2004	2005*
Indonesian	400,622	398,502	396,080
Turkish	341,400	351,648	358,846
Surinamese	320,658	325,281	329,430
Moroccan	295,332	306,219	315,821
Netherlands Antilles & Aruba	129,312	130,722	130,538

Source: CBS
*estimates

Figure 7: Main Non-Belgian Population by Ethnicity

	2004
Moroccan	81,763
Turkish	41,336

Source: http://statbel.fgov.be/pub/d2/p202y2004_nl.pdf

In 2004, consumers in the Benelux spent more than 53 billion EURO on food, the equivalent of 15% of total spending.

Figure 8: Advantages and Challenges, US Products Face In The Benelux

Advantages	Challenges
Affluent consumers	Saturated markets
Highly developed infrastructure, trade history and mentality	Transportation costs and time
Strong interest in buying new and innovative products and/or concepts	Competition from local companies
Favorable image of American products	Tariffs and Non-Tariff trade barriers

Source: USDA

The Need for Convenience

During the past 5 decades women have become increasingly active in the work force. The Benelux ranks among the highest in Europe of women working outside the home. At the same time, the Netherlands has the highest rate of women working part time.

Since time has become more scarce, consumers want to spend a minimum of time on dinner preparation. This, in combination with the increase in double income households, has been the main force behind the increasing demand for convenience food. Consumers increasingly want portioned, easy-to-prepare, healthy and tasty meals.

Food Safety

Safety of food products remains another issue for consumers. Because of a number of food safety scares during past years, this issue has become more important to consumers. These crises prompted government and many other organizations to focus on consumer demands for safe and traceable products. Retailers, processors and producers are setting up traceable supply chains to minimize risks and regain consumers' trust. On January 1, 2005, articles 11, 12, 14 - 20 of the General Food Law (2002/178/EC), regulating among others traceability, have been made compulsory for all companies at all stages of production, processing or distributing food, feed, food-producing animals, and any other substance intended to be, or expected to be, incorporated into a food or feed (for more information on this subject, please visit www.fas.usda.gov, Report GAIN BE 5008 and NL 5024).

Organic Food

Recent figures show that the organic industry still remains a niche and has not reached an overall 5 percent market share in the Benelux.

SECTION II. Exporter Business Tips

Local Business Customs
Following are some characteristics of doing business in the Netherlands, Belgium or Luxembourg:

- The majority of the business people speak English (especially in the Netherlands) and have a high level of education (Masters or Bachelors degree).

- Generally speaking, they are straightforward and business minded. Therefore, they want to be well informed on the product/service and the counterpart before doing business. At the same time they do not want to waste their time and can be quick decision makers.

- Due to the increasing power by retailers and changing consumers' demands, food processors are increasingly looking for long-term partnerships rather than a one-off business transaction.

General Consumer Tastes and Preferences
As a result of changing demographics, the need for convenience, food safety and the threat of obesity, consumer preferences are changing.

Figure 9: Consumer Trends

Consumers' needs and preferences:	
Health:	natural ingredients - lower calories – no sugar – healthy meals
Convenience:	fresh pre-packed food components – take-away – fresh ready-to-eat meals
Price:	discount - special offers
Distribution:	more specialty shops
Food Safety:	more information – more guarantees
Stores:	more personal service – wider assortment- more fresh and non-food – convenience foods – while at the same time there is huge demand for limited assortment as long as the products are low cost

Source: USDA

Food Standards & Regulations and General Import & Inspection Procedures
A detailed report on import regulation standards and also on general import and inspection procedures can be found on the FAS homepage: GAIN Report Number: NL5024 and BE5008.
http://www.fas.usda.gov/scriptsw/attacherep/default.asp

SECTION III. Market Sector Structure and Trends

Market Overview – Food Retail

In the Benelux, the food retail industry had a total turnover of about 42 billion EURO in 2004. Due to the price war between leading retailers in the Netherlands, which started in late 2003, growth in turnover was slower than in previous years. Belgian retailers have also announced campaigns with lower prices.

Retail world in the Benelux is highly consolidated and quite often retailers even work together in purchase organizations which consolidates the market even more. The figure below reflects the level of consolidation.

Figure 10: Retailers in Belgium

Company name	market share in retail market	market share on the purchase side
Carrefour	26.0%	
Mestdagh	2.2%	
		28.2%
Delhaize	20.5%	
DistriGroup 21	1.0%	
		21.5%
Colruyt	14.3%	
Spar	2.6%	
Alvo	1.8%	
		18.7%
Aldi	10.8%	10.8%
Louis Delhaize	2.0%	
Cora	4.3%	
Match	2.1%	
Other	1.5%	
		9.9%
Lidl	3.2%	3.2%
Other		7.7%

Source: Store Check

Figure 11: Retailers in the Netherlands

Company name	market share in retail market	market share on the purchase side
Albert Heijn	26.8%	26.8%
Laurus	16.8%	16.8%
Schuitema/C1000	15.8%	15.8%
Aldi	7.5%	7.5%
Lidl	2.9%	2.9%
Plus	4.8%	
Jumbo	2.9%	
Coop	1.8%	
Spar	1.5%	
Other	14.9%	
		Superunie: 25.9%
Bas van der Heijden		
Dirk van de Broek		
		Koop-Consult: 4.3%

Source: AC Nielsen

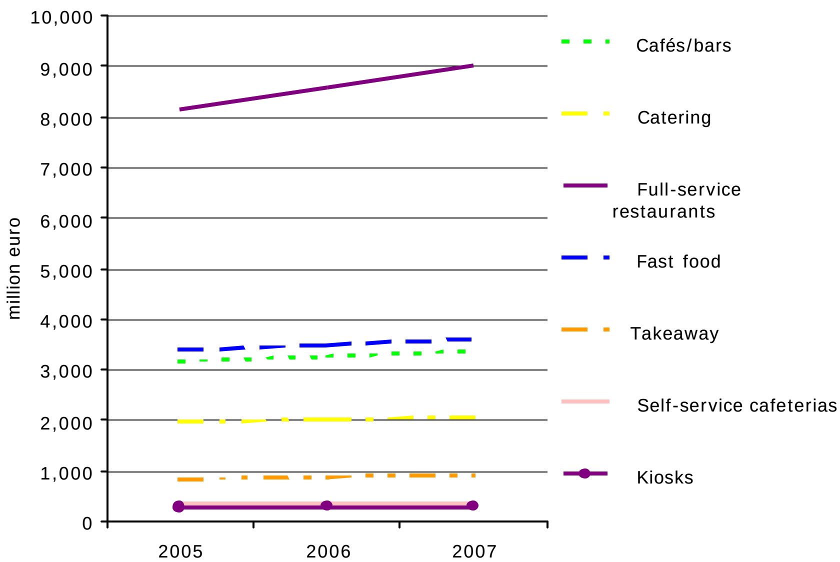
Traditional butcher and fruit & vegetable shops but also small independent family run supermarkets are losing market share. These supermarkets are either bought by bigger retailers or are closed down. The traditional butcher and fruit & vegetable shops are increasingly changing into specialty shops and the majority of these have moved into making meal components or into catering. By adding more value to their once basic products, they manage to stay in business and serve products that the regular retailer does not sell.

Competition in the Benelux food retail market will increase as new firms enter the market. Furniture retailer Ikea has said it will move into specialty grocery by launching its own label of food products next year across its stores worldwide.

Market Overview – Food Service

Figures indicate that 70 percent of food expenditures in the Benelux wind up in supermarket tills; however their share of the total food dollar has been declining. Analysts expect the hotel and restaurant and institutional food service (HRI) market share to grow further to approximately 40 percent of total food expenditures. This is the result of increasing disposable income, scarcity of time for cooking and continued increases in the number of working women. The turnover of the Benelux HRI foodservice industry in 2004 was EURO 17.6 billion.

Figure 12: Value of HRI industry sub-sector, coming 3 years



Source: Euromonitor

Unfortunately, potential U.S. sales to both the fast-food and catering sub-sectors are hampered by the same obstacles that limit sales to the retail sector. Basic products such as beef, chicken and pork are essentially barred from the market due to sanitary restrictions, while high tariffs and the restrictions on many biotech products keep processed foods from the US off store shelves.

The Benelux Fast-Food sector and Catering industries are highly consolidated. A few international and national players dominate those sub sectors. The other HRI sub sectors are highly fragmented. In general all restaurants, cafes and hotels are independently operated companies with their own purchase patterns and buyers.

Figure 13: Leading Fast-Food Companies in the Benelux

Source: USDA The Hague

Figure 14: Leading Caterers in the Benelux

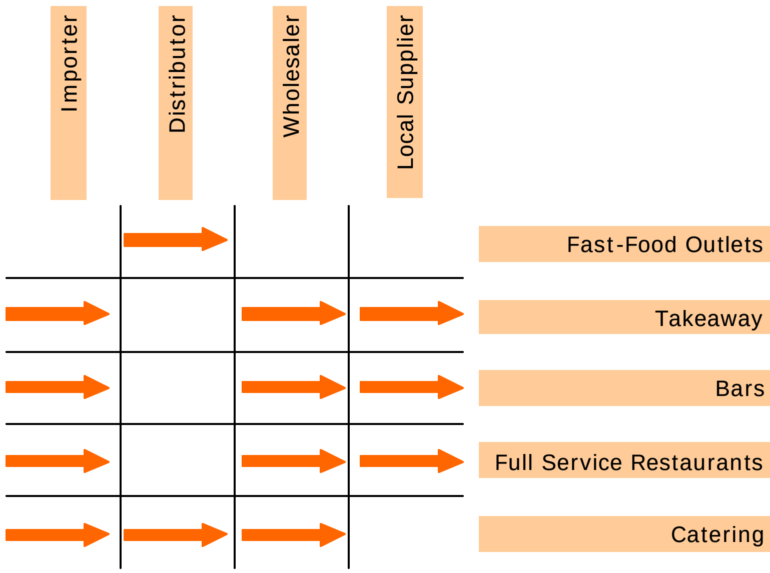
Source: USDA The Hague

Figure 15: Leading Wholesalers in the Benelux

Source: USDA The Hague

As figure 16 indicates, small and independent entrepreneurs buy their products and ingredients at the wholesaler that matches their product requirements. There are several wholesalers/distributors in the Benelux, the leading ones are indicated below. In addition to wholesalers, some products are bought directly from importers (meat, fish) or local suppliers (fruit, vegetables, bread, pastry).

Figure 16: Distribution Channel Flow Diagram



Source: USDA The Hague

Fast-food companies are frequently part of a large chain with national, regional or global presence. Products are delivered through proprietary distributors, who normally purchase products for all franchisees.

The profile of Dutch consumers shows signs of long-term transformation. New consumers are more apt to eat out as a leisure or social activity or a convenient alternative to home cooking. They are also more informed, social, health conscious and outward-looking in their consumption attitudes. This offers ample opportunities for new product and service concepts to tap these new interests.

Competition in the Benelux HRI Foodservice market will remain tough as new firms enter the market. Retailers of both food (Makro) and non-food industries (V&D, HEMA, Ikea, Gamma) have already claimed prominent positions in the market. Operators are always eager to tap into the consumer foodservice market. It is necessary to keep an eye on the movement of prospective competitors from all fronts.

For more information on The HRI Foodservice industry please visit www.fas.usda.gov GAIN NL5005.

Market Overview – Food Processing

Figure 17: Trade Statistics Benelux

	2001	2002	2003	2004
Turnover Food Processing Industry, Euro	83,341	82,746	83,000	84,000
Export All Agriculture And Food, Euro	59,514	64,850	78,095	77,951
Import All Agriculture And Food, Euro	41,303	44,560	54,139	56,240
Balance Trade Agriculture And Food, Euro	18,210	20,290	23,956	21,711
Number Food Processors	11,449	11,047	11,000	10,000

Source: World Trade Atlas, CBS, FEVIA
NOTE: all numbers in table are in million EURO, except number of processors

The food-processing sector in the Benelux, like the Dutch economy, is heavily oriented toward import, transformation and export. While the Belgian-Dutch border separates many food processors, in point of fact major food processors are clustered in a corridor formed by the port cities of Antwerp, Rotterdam and Amsterdam.

These processors serve not only the Benelux market, which would be too small to sustain them, but the entire European market. This international focus gives rise to and sustains a number of features that are unique to the Benelux food processing sector.

Turnover of the Benelux processing industry has been stable at €83,500 for the past four years. The value of imported inputs has gone up but the value of exports has grown even faster, resulting in a trade surplus estimated at €26 billion in 2004.

Knowledgeable traders, Europe’s leading ports (Rotterdam, Antwerp and Amsterdam), a good distribution system, a competitive processing industry and efficient marketing systems, make the Benelux an attractive market for trading and processing agricultural products.

Food manufacturing, handling and import regulations are almost completely harmonized within the EU, making regional trade fairly easy. Trade barriers, import regulations, import and transportation costs and time constraints all complicate imports from non-EU countries.

SECTION IV. Best High-Value Product Prospects

Commodity	Total Benelux Imports 2004 ($ thousand)	Benelux Imports from U.S. 2004 ($ thousand)	5 yr, Average Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
Fish & Seafood HS: 03	3,068	78	30%	0-22%	competition from EU and Asia	growing demand
Chocolate Food HS: 1806	932,055	5,076	10%	8-27%	competition from other European countries	demand for variety
Preserved Fruit & Nuts HS: 2008	497,591	17,446	2%	7-27%	competition from EU	huge variety for consumption and processing
Fruit and Vegetable Juices HS: 2009	1,496,264	83,791	1%	12 - 33.6%	competition from Brazil	juice market grows
Sauces, Condiments & Seasonings HS: 2103	316,103	5,876	-10%	0-10%	competition from EU	demand for authentic food stuffs
Water & Soft Drink HS: 2201+2202	1,186,554	7,850	5%	0-10%	competition from Belgium and Germany	consumers always look for new drinks or drink concepts with extra added health benefit
Wine HS: 2204	1,906,984	67,106	2%	18-25%	competition from France, South Africa, Spain and Germany	consumption of wine is growing

Source: GTIS

SECTION V. Key Contacts And Further Information

Office of Agricultural Affairs, American Embassy
U.S. Mailing Address: U.S. Embassy/ the Hague, PSC 71 Box 1000 APO AE 09715
International Mailing Address: Lange Voorhout 102, 2514 EJ The Hague, The Netherlands
Phone: 31-70-310-2299
Fax: 31-70-365-7681
e-mail: agthehague@fas.usda.gov

Food Shows Frequently Visited by Benelux Food Buyers		
Show	**When**	**Show Organizers**
HORECAVA, Amsterdam, The Netherlands Hotel, Restaurant Show	January 09 – 12, 2006	tel: + 31-(0)20-5753032 fax: + 31-(0)20-5753093 www.horecava.nl
European Fine Food Fair Maastricht, The Netherlands Exclusive Hotel, Restaurant Show	January 23 – 25, 2006	MECC Maastricht tel: +31-(0)43-3838383 fax: +31-(0)43-383830 www.efff.nl
National Food Week, Utrecht, The Netherlands	April 2007 Bi-Annual	tel: +31-(0)30-2952799 fax: +31-(0)30-2952814 www.nationalefoodweek.nl
European Seafood Exhibition, Brussels, Belgium **U.S. Participation:** USDA/FAS Washington Trade Show Office tel: +1-202-7203425 fax: +1-202-6904374	May 9 – 11, 2006	tel: +1-207-8425504 fax: +1-207-8425505 www.euroseafood.com
FMI, Chicago, United States **U.S. Participation:** U.S. Food Export Showcase tel: +1-202-2969680 fax: +1-202-2969686	May 07 – 09, 2006	tel: +1-202-4528444 fax: +1-202-4294559 www.fmi.org
World of Private Label (PLMA) Amsterdam The Netherlands	May 30 – 31, 2006	tel: +31-(0)20-5753032 fax: +31-(0)20-5753093 www.plmainternational.com
AGFTOTAAL, Ahoy Rotterdam, The Netherlands World wide Fruit & Vegetable Trade Fair	September 2007 Bi-Annual	tel: +31-(0)10-2933300 fax: +31-(0)10-2933399 www.agftotaal

Food Shows Frequently Visited by Benelux Food Buyers		
Show	**When**	**Show Organizers**
ANUGA, Cologne, Germany. One of Europe's largest trade fair for food & beverages	October 2007 Bi-Annual	tel: +49-180-5204220 fax: +49-221-821991010 www.anuga.com
SIAL, Paris, France **U.S. Participation:** USDA/FAS, Paris, France tel: + (33) 1 431 222 77 fax: +(33) 1 431 226 62	October 22 – 26, 2006 Bi-Annual Show	tel: +33-(0)1-49685498 fax: +33-(0)1-49685632 www.sial.fr
Horeca Expo, Gent, Belgium Hotel, Restaurant and Catering Show	November 20 – 24, 2005 November 19 - 23, 2006	tel: +32-(0)9-2419211 fax: +32-(0)9-2419475 email: horeca@flandersexpo.be www.horecaexpo.be

APPENDIX

Table A. Key Trade & Demographic Information for the Netherlands & Belgium

The Netherlands

Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%) [1/]	$23,454 / 5%
Consumer Food Imports From All Countries ($Mil) / U.S. Market Share (%) [1/]	$14,457 / 2%
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%) [1/]	$1,167 / 2%
Total Population (Millions) / Annual Growth Rate (%)[2/]	16.3 / 1.0%
Number of Major Metropolitan Areas	2
Per Capita Gross Domestic Product (U.S. Dollars) [3/]	$29,500
Unemployment Rate (%)[2/]	6.75
Per Capita Food Expenditures (U.S. Dollars) [3/]	$ 2,431

1/ Source: UN Trade Database CY 2003
2/ Source: Central Bureau of Statistics. 2004
3/ Source: CIA 2004

Belgium

Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%) [1/]	$19,978 / 3%
Consumer Food Imports From All Countries ($Mil) / U.S. Market Share (%) [1/]	$13,030 / 1%
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%) [1/]	$1,381 / 1%
Total Population (Millions) / Annual Growth Rate (%)[2/]	10.4 / 0.15%
Number of Major Metropolitan Areas	2
Per Capita Gross Domestic Product (U.S. Dollars) [3/]	$30,600
Unemployment Rate (%) [2/]	7.8
Per Capita Food Expenditures (U.S. Dollars) [2/]	$ 2,730

1/ Source: UN Trade Database CY 2003
2/ Source: National Bank of Belgium 2004
3/ Source: CIA 2004

Exchange Rate

Year	U.S. $	EURO
2001	1	1.12
2002	1	1.06
2003	1	0.88
2004	1	0.81

Table B. Consumer Food & Edible Fishery Product Imports

Netherlands Imports	Imports from the World			Imports from the U.S.			U.S Market Share		
	2001	2002	2003	2001	2002	2003	2001	2002	2003
	US$ Million			US$ Million			Percentage		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	9,840	11,288	14,457	416	343	337	4.0	3.0	2.0
Snack Foods (Excl. Nuts)	458	585	818	3	4	5	1.0	0.7	0.7
Breakfast Cereals & Pancake Mix	36	42	62	1	1	1	2.0	0.7	0.6
Red Meats, Fresh/Chilled/Frozen	640	783	1,132	1	1	1	0	0	0
Red Meats, Prepared/Preserved	447	451	549	1	1	1	0	0	0
Poultry Meat	233	293	444	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	1,415	1,523	1,848	1	1	1	0	0	0
Cheese	350	348	472	1	1	1	0	0	0
Eggs & Products	69	97	170	3	1	2	4.0	1.0	1.0
Fresh Fruit	1,184	1,304	1,869	24	24	32	2.0	2.0	2.0
Fresh Vegetables	661	841	1,075	1	1	2	0.1	0.1	0.2
Processed Fruit & Vegetables	796	818	988	27	31	27	3.0	4.0	3.0
Fruit & Vegetable Juices	522	620	663	37	41	34	7.0	7.0	5.0
Tree Nuts	166	159	266	41	36	54	24.0	23.0	20.0
Wine & Beer	575	654	869	71	15	12	12.0	2.0	1.0
Nursery Products & Cut Flowers	801	905	1,053	53	54	54	7.0	6.0	5.0
Pet Foods (Dog & Cat Food)	85	137	188	22	12	8	26.0	9.0	4.0
Other Consumer-Oriented Products	1,403	1,727	1,992	133	122	106	9.0	7.0	5.0
FISH & SEAFOOD PRODUCTS	1,024	936	1,167	20	21	27	2.0	2.0	2.0
Salmon	37	44	34	9	6	7	23.0	14.0	21.0
Surimi	10	7	712	0	1	1	0	0.5	2.0
Crustaceans	239	258	276	1	1	1	0	0.2	0.2
Groundfish & Flatfish	444	315	458	5	8	11	1.0	3.0	2.0
Molluscs	34	44	73	3	3	5	10.0	7.0	6.0
Other Fishery Products	261	268	313	3	3	4	1.0	1.0	1.0
AGRICULTURAL PRODUCTS TOTAL	17,026	19,071	23,454	1,361	1,131	1,136	8.0	6.0	5.0
AGRICULTURAL, FISH & FORESTRY TOTAL	19,717	21,673	26,610	1,420	1,180	1,191	8.0	5.0	4.0

Source: United Nations Statistics Division

Belgian Imports	Imports from the World			Imports from the U.S.			U.S Market Share		
	2001	2002	2003	2001	2002	2003	2001	2002	2003
	US $ Million			US $ Million			Percentage		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	9,924	10,313	13,030	156	154	150	2.0	1.0	1.0
Snack Foods (Excl. Nuts)	623	686	863	2	2	2	0.3	0.3	0.3
Breakfast Cereals & Pancake Mix	69	76	105	1	1	1	0.5	0.5	0.3
Red Meats, Fresh/Chilled/Frozen	500	500	639	12	8	8	2.0	2.0	1.0
Red Meats, Prepared/Preserved	341	353	467	1	1	1	0	0	0
Poultry Meat	242	230	304	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	1,270	1,185	1,553	1	1	1	0	0	0
Cheese	759	782	982	0	0	1	0	0	0
Eggs & Products	54	67	89	1	1	3	0.3	1.0	3.0
Fresh Fruit	1,427	1,617	2,161	12	13	14	0.8	0.8	0.6
Fresh Vegetables	486	542	680	1	1	1	0	0	0
Processed Fruit & Vegetables	770	791	951	13	15	12	2.0	2.0	1.0
Fruit & Vegetable Juices	464	467	519	34	25	13	7.0	5.0	2.0
Tree Nuts	124	153	175	24	39	44	19.0	26.0	25.0
Wine & Beer	762	873	1,035	6	3	3	0.8	0.4	0.3
Nursery Products & Cut Flowers	288	313	385	6	6	6	2.0	2.0	2.0
Pet Foods (Dog & Cat Food)	233	253	332	15	14	19	6.0	5.0	6.0
Other Consumer-Oriented Products	1,511	1,424	1,790	32	26	26	2.0	2.0	1.0
FISH & SEAFOOD PRODUCTS	996	1,094	1,381	15	16	16	2.0	1.0	1.0
Salmon	72	68	81	5	3	3	7.0	5.0	3.0
Surimi	2	2	3	0	1	1	0	4.0	2.0
Crustaceans	360	372	501	3	2	2	0.7	0.6	0.4
Groundfish & Flatfish	273	328	381	3	4	4	1.0	1.0	1.0
Molluscs	100	107	146	1	2	2	0.6	2.0	2.0
Other Fishery Products	189	217	269	4	5	5	2.0	2.0	2.0
AGRICULTURAL PRODUCTS TOTAL	15,430	16,047	19,978	353	483	504	2.0	3.0	3.0
AGRICULTURAL, FISH & FORESTRY TOTAL	18,020	18,731	23,317	431	548	566	2.0	3.0	2.0

Source: United Nations Statistics Division

Table C. Top 15 Suppliers of Consumer Foods & Edible Fishery Products

CONSUMER-ORIENTED AGRICULTURAL TOTAL
Report: Netherlands Imports - Top 15 Ranking

$1,000	2001	2002	2003
Germany	1,999,859	2,426,136	3,343,596
Belgium	1,479,558	1,972,376	2,529,865
France	724,707	915,198	1,190,688
Spain	610,459	759,487	1,038,832
Brazil	566,208	652,581	790,554
United Kingdom	391,186	469,173	564,828
South Africa	263,931	258,959	389,648
Italy	203,118	272,141	388,576
United States	416,233	343,144	337,448
Ireland	214,313	239,976	331,162
New Zealand	169,286	211,572	300,926
Denmark	144,753	188,369	256,947
Chile	176,656	172,025	238,060
Kenya	127,655	151,120	194,804
Argentina	123,329	150,709	184,645
Other	2,228,936	2,105,010	2,376,333
World	9,840,119	11,287,772	14,456,971

Source: United Nations Statistics Division

FISH & SEAFOOD PRODUCTS
Report: Netherlands Imports - Top 15 Ranking

$1,000	2001	2002	2003
Germany	115,709	177,645	236,211
Belgium	64,943	79,055	144,632
United Kingdom	88,704	90,314	119,502
Denmark	84,245	98,857	103,923
Morocco	18,668	40,936	50,328
India	6,401	25,874	44,951
Indonesia	27,147	28,632	39,772
Tanzania,	18,052	32,086	38,265
France	31,885	42,049	34,725
United States	19,660	21,184	26,846
China	32,680	9,233	25,480
Nigeria	28,737	20,888	25,368
Norway	25,134	22,628	17,830
Bangladesh	20,407	20,682	16,009
Iceland	156,273	12,924	15,909
Other	284,924	212,989	227,663
World	1,023,532	935,930	1,167,448

CONSUMER-ORIENTED AGRICULTURAL TOTAL
Report: Belgium Imports - Top 15 Ranking

$1,000	2001	2002	2003
France	2,676,877	2,751,968	3,428,595
Netherlands	2,356,860	2,402,525	3,030,342
Germany	1,253,453	1,257,918	1,699,852
Spain	370,455	405,381	534,280
Italy	385,549	394,918	516,349
United Kingdom	303,518	332,165	411,307
New Zealand	258,517	287,680	385,447
Brazil	272,486	275,233	298,731
Costa Rica	192,134	203,183	289,721
Colombia	141,168	202,640	271,437
South Africa	149,355	172,137	153,870
Argentina	139,250	138,068	153,513
United States	156,417	154,159	150,482
Ecuador	96,676	90,116	139,938
Cote d'Ivoire	34,259	58,796	114,145
Other	1,137,195	1,185,700	1,452,136
World	9,924,207	10,312,602	13,030,162

Source: United Nations Statistics Division

FISH & SEAFOOD PRODUCTS
Report: Belgium Imports - Top 15 Ranking

$1,000	2001	2002	2003
Netherlands	277,245	276,558	347,927
France	98,117	105,342	125,951
Denmark	85,634	79,992	93,803
Germany	58,762	66,410	82,472
Bangladesh	27,725	47,849	74,554
United Kingdom	61,603	59,791	69,683
India	17,040	23,549	50,905
Iceland	32,764	34,408	46,792
Indonesia	15,622	17,304	39,471
Canada	28,728	28,593	35,016
Vietnam	21,511	18,462	33,383
Uganda	43,147	40,957	32,979
Tanzania	817	38,746	27,428
Sweden	15,656	16,670	22,663
China	6,923	4,886	20,504
Other	205,145	233,999	277,081
World	996,444	1,093,532	1,380,627